

# **REQUEST FOR STATEMENTS OF QUALIFICATIONS FOR LEED COMMISSIONING AGENT**

## **I. INTRODUCTION**

The Redevelopment AGENCY of the City of San Jose ("AGENCY") is soliciting Statements of Qualifications from professional firms ("CONSULTANT"). The successful CONSULTANT will provide all aspects of Leadership in Energy and Environmental Design ("LEED") commissioning services for various projects including, housing, theaters, office buildings, museums, community centers, and other public and private buildings through a Master Agreement. Each request for services will be authorized by a separate authorization specifying which elements of the following scope of services will be necessary.

## **II. SCOPE OF SERVICES**

A. The successful CONSULTANT will be called upon to provide commissioning services and to perform any of the following tasks, in accordance with all applicable LEED Fundamental and Enhanced Commissioning of Building Energy Systems for LEED – NC 2.2 Reference guide for New Construction, or LEED Fundamental Commissioning of Building Energy Systems for LEED – EB 2.0 Reference guide for Existing Buildings, state, federal and local laws, rules, and regulations. CONSULTANT's services may include, but are not limited to:

### **MEETINGS**

During the course of services, as more specifically directed by each separate Work Authorization CONSULTANT shall attend coordination meetings with AGENCY, which at AGENCY's discretion, may include the AGENCY's design consultants, representatives from the City, or other project stake holders. Other project stake holders include future Building Operator, or end user of these facilities. CONSULTANT shall provide commissioning meeting minutes for all items related to CONSULTANTS scope of services to AGENCY staff.

### **DESIGN DOCUMENTATION PHASE**

CONSULTANT shall review, as directed by AGENCY, Schematic Design Documents prepared by AGENCY's design consultant for each commissioned feature or system, and also for features or systems that significantly interact with the commissioned features.

CONSULTANT shall review, as directed by AGENCY, design Development Documents to ensure that each commissioned feature or system meets the designed intent relative to functionality, energy performance, water performance, maintainability, sustainability, system cost, indoor environmental quality and local environmental impacts.

CONSULTANT shall analyze the Project construction documents ("CD") for the following issues relative to the active building systems, mechanical, electrical, plumbing, structured cabling and building automation, including: design intent, completeness, absence of errors and/or omissions; good overall coordination and system integration; systems operation once in interactive and dynamic mode; energy efficiency, maintenance

cost, indoor air quality, workplace productivity; and value and long term performance over an expected fifty-year lifecycle.

CONSULTANT shall provide Division 1 specifications for AGENCY to incorporate into CD specification Divisions 1, 14, 15, 16, and 17, setting forth commissioning requirements for all major systems and detailed requirements for as-built drawings and operations and maintenance (O&M) manuals ("Commissioning Specifications").

CONSULTANT shall review the AGENCY's Project Requirements (OPR) & Basis of Design (BOD), construction document submittals and verify review comments in subsequent design submissions are addressed.

#### COMMISSIONING PLAN

CONSULTANT shall develop a written Building System Commissioning Plan setting forth pre-functional and functional test procedures protocols for compliance with design criteria and details reflected in the CD.

CONSULTANT's Building System Commissioning Plan shall be customized to the Project specifics to ensure complete and proper testing, and documentation of performance in compliance with the project specifications.

CONSULTANT shall submit a draft Commissioning Plan for review by the AGENCY, and upon receiving comments, prepare and submit a final Commissioning Plan.

#### CONSTRUCTION PHASE

Submittals and Shop Drawings - CONSULTANT shall review contractor submittals and shop drawings prepared pursuant to Commissioning Specifications, and evaluate construction contractor proposed substitutions for: improved cost/benefit to the AGENCY, considering quality and performance, including hardware and software components, over the Project's 50 year operating lifecycle; overall conformance with design intent, functional testing plans, start-up and operation of the Building Systems; good coordination and documentation with respect to building automation and life safety systems.

Construction Monitoring - CONSULTANT shall monitor contractor progress in conjunction with the AGENCY'S Construction Manager prior to pre-functional and functional testing, for the following: quality of installation; maintainability; adherence to Project CDs and approved submittals; omissions that hinder start-up, preclude proper system balancing, or inhibit operations over the long term; various contractor start-up, test/balance and operational debugging activities, completion of work per CDs, measured performance with data submitted; Coordination between contractors, test and balancing subcontractors and the building automation system contractor; and Software performance and stability.

CONSULTANT shall, during construction of the Project: review final reports submitted by contractors in preparation for functional testing; assist CM to expedite problem resolution; and assist AGENCY's Operation and Maintenance ("O&M") staff with participation in vendor equipment start-up and demonstration activities.

Functional Testing - Upon completion of the construction to the appropriate stage, CONSULTANT shall proceed with functional testing described in the Commissioning Plan for Building system compliance with the CDs and design intent, as follows: For Control Systems -conduct point-to-point verification of correct termination, identification and calibration, test in normal, alarm and failure modes; For Building Systems -test individual equipment performance, capacity verification, system functionality in all operating modes, including controllability under part load operations.

During functional testing, CONSULTANT shall diagnose and resolve problems, coordinate contractor re-testing until Building System verification is obtained; and identify performance shortfalls, recommend remedial measures that benefit AGENCY in the long term maintenance/operation.

During functional testing CONSULTANT shall assist AGENCY O&M staff develop their building systems understanding, including the design intent, normal and alternative operating modes, control sequences and specifics of equipment O&M.

#### CONTRACT CLOSE OUT ACTIVITIES

CONSULTANT shall provide services to the AGENCY and CM in closing out construction contracts, and coordinate site inspection and testing with AGENCY O&M staff, as follows: Punch List items -verify Building Systems functionally tested and satisfactory for final use and operations; Record Drawings -review for complete and accurate as-built field conditions and provide report of discrepancies for corrections; O&M Manuals -review contractor submittals, verify complete, accurate and tailored to the equipment/systems installed in the facility, including one-line diagrams and warranties, provide report of discrepancies for correction; Formal Training -assist AGENCY O&M staff to complete full range of classroom training required by CDs, oversee contractor furnished training, provide systems training in addition, as needed.

#### FINAL COMMISSIONING REPORT

CONSULTANT shall prepare and submit to AGENCY a Final Commissioning Report organized by Building Systems, documenting results of equipment and system testing; and including recommendations for systemic enhancements and additional O&M staff training that the AGENCY can implement to assist with post-occupancy facility management.

#### POST-OCCUPANCY PHASE

CONSULTANT shall prepare and submit to AGENCY a re-commissioning manual to include all technical information related to the commissioned systems, describing energy

and water efficiency features as well as optimum set points and reset scheduled.; and including plans and procedures for re-commissioning systems.

#### RECOMMISSIONING PHASE

CONSULTANT shall review building operation systems within 10 months after substantial completion with Operations and Maintenance staff and occupants and submit to AGENCY a report of findings. Report shall include a plan for resolution of outstanding commissioning-related issues.

CONSULTANT shall provide commissioning services and may be directed to perform any of the following tasks, in accordance with all applicable CONSULTANT's services may include, but are not limited to:

1. Verify and ensure that fundamental building elements and systems are installed, calibrated and operating as intended so that consultant can deliver functional and efficient performance. Carry out a comprehensive existing building commissioning including the following procedures:

- a. Develop a comprehensive building operations plan that meets the requirements of current building usage, and addresses the heating system, cooling system, humidity control system, lighting system, safety systems, and the building automation controls;
- b. Prepare a commissioning plan for carrying out the testing of all building systems to verify that they are working according to the specifications of the building operations plan;
- c. Implement the commissioning plan documenting all the results;
- d. Repair or upgrade all system components that are found to be not working according to the specifications of the building operation plan; and
- e. Re-test all building components that required repairs or upgrades to verify that they are working according to the specifications of the building operations plan.

CONSULTANT shall submit a narrative summary of the current building operations plan that highlights major building systems and assemblies.

CONSULTANT shall provide an update of previous filings – a narrative summary of the current building operation plan that highlights major building systems and assemblies. AND EITHER:

Documentation that all of the actions in the requirements have been completed

OR

If one or more aspects of the five actions in the requirements were not completed in the original submittal, submit a progress report showing that the 5-year plan remains on schedule for meeting all of the requirements.

### **III. SELECTION CRITERIA**

The Agency will consider the following qualifications during the evaluation process:

- A. Experience / strength of Project Team and Project Manager/AGENCY point of contact.
- B. Demonstrated ability to remain within fee.
- C. Firm's demonstrated ability to produce work on schedule.
- D. Experience with public work/public bid projects.
- E. Demonstrated experience and ability to coordinate with local, state and federal agencies.
- F. Ability to meet minimum insurance (include sample).
- G. Location of office and proposed organizational structure for quick / efficient response to Agency requests.

#### **IV. STATEMENT OF QUALIFICATION SUBMISSION GUIDELINES**

- A. Introduction.  
Briefly summarize the firm's background, size, scope, and nature of services. If this is a joint venture or involves the use of one or more subcontractors as proposed, explain in detail the responsibility of each entity. Include the firm's and any subcontractor's current volume of work and employment.
- B. Background.  
Describe similar projects in which you have related experience within the last five (5) years. List locations, descriptions, and services performed. Please include contact names, addresses, and telephone numbers.
- C. Rate Schedule.  
Your submittal should include a fee schedule for all professional, technical, and support staff that will be valid for a period of one (1) year. The fee schedule should include all overhead, phone, postage, facsimile and copies in hourly rate (mileage / transit to and from local offices will not be allowed).

All information contained in the proposal should be concise and responsive to the content of this request and prepared in a wire or plastic bound 8-1/2" x 11" format. Please do not submit information that must be returned.

#### **V. SELECTION PROCESS**

The AGENCY will review all submitted Statements of Qualifications and will evaluate them against the selection criteria listed herein. CONSULTANTs determined by the AGENCY to be the most qualified, at the AGENCY's sole discretion, will be selected for interviews. CONSULTANTs invited to interview may be requested to furnish additional written materials regarding their qualifications for potential AGENCY projects. The AGENCY will conduct interviews and if a successful candidate or candidates is selected, such selection will be on the basis of the presentations and qualifications of the candidates. If the CONSULTANT takes issue

with any of the above mentioned items an outline, clearly define reasoning of objections, and should be submitted with the Statement of Qualifications.

The AGENCY reserves the right, at its sole discretion, and based solely on its determination of the candidate firm's qualifications (both subjective and objective), to accept or reject any or all Requests For Qualifications, to alter the selection process in any way, to postpone the selection process for its own convenience at any time, to waive any defects in the Request for Qualifications, and to re-advertise for this work. The AGENCY also reserves the right to accept or reject any individual subconsultants that a candidate proposes to use.

Please submit six (6) copies of the Statement of Qualifications no later than 5:00 p.m. Monday, February 25, 2008 to:

Bill Ekern, Director of Project Management  
The Redevelopment Agency  
of the City of San Jose  
200 E. Santa Clara Street, 14<sup>th</sup> Floor  
San Jose, CA 95113  
408-794-1862

This Request for Statements of Qualifications and the interview process shall not in any way create a binding contract of any kind between the AGENCY and any candidate firm. If the AGENCY selects a candidate firm, it is expected that the AGENCY's standard form CONSULTANT agreement will form the basis of a contract between the parties. All legal rights and obligations between the successful candidate firm and the AGENCY will come into existence only when such an agreement is signed and delivered by the parties, and the legal rights and obligations of each shall at that time be only those which are set forth in the agreement and any other documents specifically referred to in the agreement.

The candidate firms acknowledge and agree that in submitting a Statement of Qualifications pursuant to this Request for Qualifications, the preparation of all materials for submittal and all presentation are at their sole cost and expense, and the AGENCY shall not, under any circumstances, be responsible for any cost or expense incurred by the candidate firms in this regard. In addition, the candidate firms acknowledge and agree that all submitted Statements of Qualifications shall remain the property of the AGENCY.